State of North Carolina
Office of Information Technology Services

Michael F. Easley, Governor   George Bakolia, State Chief Information Officer

MEMORANDUM

To: Departmental CIOs and CFOs

From: George Bakolia

Subject: Announcement of Kickoff of Application Portfolio Management
             Departmental Response Required

Date: January 9, 2006

In a companion memorandum sent to members of the Executive Cabinet, I announced a new statewide project to improve the information known about the state's software applications that enable the delivery of services to citizens, other governments and businesses. I used that memorandum to ask department heads to lend their active support to this project. The purpose of this memorandum is to ask for your support, to provide you with additional information and to give you an opportunity to choose the timeframe for your agency's participation in the roll out this spring.

Background: As you know, the General Assembly directed the Office of Information Technology Services to complete an inventory of the state's computer applications and determine their status, both technically and functionally. Working with you and with Gartner and Keane, Inc., ITS analyzed the state's applications and reported to the General Assembly in March 2005. G.S. 147-33.90 requires an update of that inventory every two years.

I promised agency CIOs and their staff that the work done for the 2005 report would not be lost and that we would turn the one-time collection effort into an on-going program. While "behind the scenes" work with agency involvement to design the system has been under way for several months, the Application Portfolio Management initiative will have its official kickoff this month.

Goal and Resource Requirements: The goal of the initiative is to develop information about an agency's systems that can be used by your staff for better planning, budgeting, decision making and management. **Application Portfolio Management is not the sole responsibility of the technical staff—business and program staff must be involved as well.** The roll-out will require updating and expanding the previous data collected and training technical and business staff so they will be able to analyze your own portfolio and run your own reports.

This work will take place between **January and June of 2006.** It will build upon the work done for the agency and statewide management and approval of IT projects.

ITS, using funds from the Information Technology Fund, will provide training, software licenses, and support for all agencies. Your department is expected to dedicate staff time to attend the training, update the information on your application software, perform assessments and develop action plans. The amount of time required will depend on the number of applications in your department and the number of staff that are involved.

Key Dates—Overview Sessions: As with the Project Portfolio Management Initiative, this project will start with a series of identical theory and overview sessions. You are strongly encouraged to send all of the staff who will be involved in this effort to **one** of the overview sessions. The sessions are scheduled at the Archives and History Auditorium at 109 E. Jones Street on the following dates and times:

1   January 17 at 2:00 PM
2   January 18 at 10:30 AM
3   January 24 at 2:00 PM
4   January 25 at 2:00 PM

While reservations for the overview sessions are not required, we need to know approximately how many people will attend each session so that we have sufficient copies of the handouts. Please notify Michelle Jernigan at michelle.jernigan@ncmail.net of the dates and numbers of your staff who will be attending at least 24 hours in advance of the session.

Key Dates—Agency Participation in Roll-out: DPI and DENR have kindly agreed to serve as the Beta agencies for this initiative. Their work will take place in January, and their recommendations will be incorporated into the rollout to other agencies in February through June. In order to divide the activities into workable units, the rollout will be done in four separate waves, with five to six agencies participating in each wave. The dates for the waves are:

Wave One—March 6 to April 7th
Wave Two—March 27 to April 28th
Wave Three—April 17 to May 19th
Wave Four—May 8 to May 31st

A fact sheet on agencies and their applications as well as a detailed list of the training and meeting **requirements** for each of the waves will be posted on the SCIO's web site at http://www.scio.state.nc.us/PortfolioManagementInitiative.asp. The training sessions will take place at the new ITS facility at 3900 Wake Forest Rd. Please review these dates and **sign your department up for one of the waves by sending your first and second choices of dates to Michelle Jernigan by January 31st.** We will try to accommodate your preferences but must have manageable groups representing a reasonable balance of large, medium and small agencies in order to provide you with assistance.

If you would like to discuss the project or the schedule of activities, please contact either Tom Runkle at tom.runkle@ncmail.net or 981-5514 or Denny McGuire at denny.mcguire@ncmail.net or 981-5150. I am very excited about this project and think that it will provide us with key indicators to improve the management of technology in state government.